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Nürnberg, July 30th 1952

Hop Report 1951/52

Divergent tendencies became evident in the development of world markets which were influenced by the oscillating political situation since mid 1951. A general reduction of inventories became especially noticeable since the beginning of 1952. The incipient normalisation resulted in lower quotations for a number of commodities as a certain deflationary tendency prevailed.

**Economical
Situation**

The exchange situation of Germany within the EPU (European Payments Union) improved so that steps to facilitate imports were possible. A new and partially liberalized system of imports went into effect on January 1st, 1952, by decree No. 56/51 of the *Bundeswirtschafts-Ministerium*. The dollar gap, however, continues to exist and the resulting dollar drive tends to influence hop exports among others.

An increased production of beer during 1951 as compared with 1950 is shown in the following countries: Argentina 5%, Australia 4%, Belgium 3%, Bolivia 14%, Canada 1%, Germany 28%, France 19%, Indochina 12%, Japan 63%, Morocco 12%, Mexico 16%, Norway 7%, Austria 1%, Peru 7%, Switzerland 6%, Spain 4%, Uruguay 11%, USA. 1%.

**Production
of beer**

A lower production in 1951 as against 1950 is notable in Chile 4%, the Netherlands 2%, Italy 14%, Portugal 10%.

Weights and measures

1 ha = 2.934 bayr. Tagwerk, 1 ha = 2.471 acres, 1 acre = 0.405 ha
1 Liter = 0.2642 gall. (USA.) 1 gall. (USA.) = 3.7853 Liter
= 0.2201 gall. (Brit.) 1 gall. (Brit.) = 4.5435 Liter
1 hl = 100 l = 26.42 gall. = 0.85 bbl. (USA.) 1 bbl. (USA.) = 31 gall. = 1.1734 hl
= 22.01 gall. = 0.6114 barrel (Brit.) 1 barrel (Brit.) = 36 gall. = 1.6356 hl
1 kg = 2.20462 lbs. 1 lb = 0.45359 kg
1 Ztr. = 50 kg = 110.23 lbs = 0.984 cwt. (Brit.) 1 cwt. (Brit.) = 112 lbs. = 50.8 kg = 1.016 Ztr.
= 1.102 cwt. (USA.) 1 cwt. (USA.) = 100 lbs = 45.36 kg = 0.9072 Ztr.
DM 1.— = US\$ —.23809
DM 4.20 = US\$ 1.—
US\$ 2.80 = DM 11.76 = £ 1.—.—

Production of Beer 1951			
Country	1000 bbl. of 31 gall. each	Country	1000 bbl. of 31 gall. each
U. S. A.	89,370	Cuba	1,071
England	34,878	Union of South Africa	966
Germany		Finland	921
West 20,556		Netherlands	918
East 4,250 *)	24,806	Venezuela	909
Belgium	10,619	Chile	850
Czechoslovakia*)	7,650	Yugoslavia*)	684
France	7,621	Spain	592
Canada	7,235	Norway	539
U. S. S. R.	7,225	Peru	493
Brazil	6,443	Uruguay	425
Australia	6,289	Panama	306
Mexico	4,849	Philippines	297
Argentina	3,385	Luxembourg	293
Eire (1950)	3,213	Bolivia	280
Columbia *)	3,060	Indochina *)	255
Denmark	3,009	Greece	225
Austria	2,505	Morocco *)	238
Sweden (1950)	2,422	Bulgaria *)	212
Japan	2,308	Turkey	170
Poland *)	1,912	Ecuador	122
Switzerland	1,793	Egypt	106
New Zealand (1950)	1,321	Portugal	102
Italy	1,136	Siam	17

*) Estimate

Production of beer in Western Germany during the fiscal year from April 1st, 1951 to March 31st, 1952 amounted to 19,895,900 bbl.
Output in the Western Zone of Berlin for the same period was 660,889 „
Total 20,556,789 bbl.

The above figures include 297,581 bbl. delivered taxfree to the occupation forces (Western Berlin 9612 bbl.) and exports including sales against foreign currency within Germany totalling 345,215 bbl. (Western Berlin 6,803 bbl.).

Brewers Exhibition 1951

A German brewers' exhibition took place in Munich from September 24th to October 7th, 1951 on the occasion of the 75th anniversary of the *Wissenschaftliche Station für Brauerei* in Munich. A number of congresses and lectures took place at the same time.

Supplies of malt and barley in Germany

A favourable barley crop in 1951 induced brewers and maltsters to slow purchases as decreasing prices seemed to be indicated. In contrast, however, offers in malting barley were low, resulting in higher prices and increased demand. A release of other feedstuffs which might have eased the barley situation was not effected. Purchases of malting barley on the world market became impossible at that time. Official ceilings in Germany were not respected anymore and it is said that prices up to DM 70.— per 100 kilos of barley have been offered and accepted.

A change took place in consequence of the trend of the world market. Malting barley became available from Denmark, Chile and the Netherlands. Inland quotations had to come to the level of subsidized imports.

Considerable quantities of malt were imported from Belgium, France, Poland and Czechoslovakia at the time of the most pronounced lack of supplies. While malt pays ad valorem duties of 20% plus 4% turnover tax, barley is not subject to duties.

Inventories in German breweries are generally considered satisfactory and will suffice until the new crop 1952. The situation on the malt and barley market, however, had at times considerable influence upon the brewers' decision regarding purchases of hops.

The winter 1950/51 was warmer than normal. Abundant precipitations brought a welcome increase to subsoil moisture.

Cool weather during April 1951 retarded growth. Fleas appeared during warmer weather about the end of April but did little damage. At the same time there appeared first signs of **Red Spider** which could be controlled with existing sprays. The same applies to **Aphids**. Control of insect pests has been greatly facilitated as insecticides were mixed into the regular sprayings against **Downy Mildew**.

Downy Mildew constituted a real danger for hops during the rather wet weather in 1951. Farmers have been very attentive in protecting their gardens against this disease and it can be stated that the good result of crop 1951 is in a high degree due to these efforts.

Grubworms have increased notably in some parts since 1949. The extent of these pests in some districts is apt to cause apprehension.

The cool weather continued during the month of May so that growth generally was about 8—10 days later than normal. Warmer weather during the end of May resulted in a very good development and weather during June 1951 further benefitted the plant and the development of numerous laterals.

Bloom was late but favoured by warmth and moisture so that conditions were favourable for an abundant set. Hot and sultry weather predominant during July and August 1951 stimulated the **Formation of the cones** so that **Picking** which started about 10 days later than normal brought a very big harvest.

Cones were numerous but grew only to about average size. Colour was not quite uniformly green but content of lupulin was higher than in 1950 and average bitter values were high.

In the **Hallertau** uncovering and cutting began sporadically by the end of March and was general by the beginning of April 1951. Spring work was finished in gardens on dense soil about the end of April. The plant had wintered well in spite of abundant precipitations but **Cuttings** were sometimes smutty. **Grubworms** were found in gardens on light and middling soils. Growth was retarded by cool weather until the middle of May. Later on development improved by ample precipitations and warmth. The general aspect of the crop in the Hallertau was very satisfactory in June 1951. There appeared only a few defective gardens and development of laterals was good on the average. First **Bloom** was noted on June 22nd, 1951. Plants had reached the height of the wires everywhere by the middle of July and were generally overhanging the trellises.

Extensive rainfalls during the end of July caused a flood near Mainburg without damaging hop gardens. Bloom developed slower and not so uniformly as normal but was notably rich. **Sizing of the cones** benefitted by abundant moisture and high temperatures. **Picking** began sporadically on August 23rd and was in full swing on August 27th. On the 24th of August a **Storm** over the whole district of the Hallertau caused in some parts considerable damages to the ripening hops.

The cones of the Hallertau hops crop 1951 were of middling size, not quite uniform in colour but with a fine sprig and ample light coloured lupulin and of good aroma. The range of quality, however, was greater than in 1950.

The wet weather during the summer of 1951 was very welcome in the **Spalt district** where much rain is always desirable. In this district too development was retarded until the second half of May. Warmer weather since then resulted in a speedier growth which continued in June under abundant rainfall. **Burrs** appeared about the 10th of July and an abundant **Bloom** was noticed about a fortnight later.

Very hot weather during August 1951 intensified somewhat the development of **Red Spider**. **Sizing of the cones**, however, progressed satisfactorily in spite of the dry weather and improved further on. **Picking** began on August 27th. The very wet weather in 1951, so desirable for the district of Spalt, resulted in a very big crop. Qualities had a somewhat wider range and the hops were of smaller size than the year before but rich in lupulin and of good aroma.

Acreage, Yield and Production 1950 and 1951.

	Acreage 1950 Acres	Yield Pounds	Production 1950 Pounds	Acreage 1951 Acres	Yield Pounds	Production 1951 Pounds
Hallertau	12,039	1,275	15,346,772	12,563	1,623	20,392,550
Spalt	1,826	1,325	2,419,879	2,071	1,464	3,031,325
Hersbrucker Gebirge	1,100	1,290	1,418,660	1,557	1,104	1,719,588
Jura	133	864	114,970	234	881	206,240
Bavaria	15,098	1,278	19,300,281	16,425	1,543	25,349,703
Tettwang	1,164	1,136	1,322,760	1,515	1,423	2,155,878
Wurtemberg	465	1,044	485,232	558	778	434,086
Baden	81	680	55,115	86	804	69,114
Rheinpfalz	47	1,524	71,650	69	941	64,925
Germany	16,855	1,260	21,235,038	18,653	1,505	28,073,707
Saaz (Zatec)	16,556					
Auscha (Ustek)	1,853					
Other Districts	1,359					
Czechoslovakia	19,768	558	11,023,000*)	20,262	571	11,574,150*)
Alsace	2,174	1,268	2,755,750	2,471	1,338	3,306,900
Dep. Côte d'Or	346	1,147	396,828	371	891	330,690
Northern France	865	1,019	881,840	618	1,338	826,725
Lorraine				74	596	44,092
France	3,385	1,192	4,034,418	3,534	1,276	4,508,407
Alost	408	1,621	661,380	507	1,560	790,900
Poperinghe	902	1,894	1,708,565	1,149	1,784	2,050,278
Yodelée				17	1,589	27,006
Belgium	1,310	1,809	2,369,945	1,673	1,714	2,868,184
Slovenia	3,459	351	1,212,530	4,028	668	2,689,612
Backa	445	495	220,460	531	353	187,391
Jugoslavia	3,904	367	1,432,990*)	4,559	631	2,877,003
Poland	1,483	535	793,656*)	1,483	743	1,102,300*)
USSR	4,942	669	3,306,900	4,942	669	3,306,900*)
Continent	51,647	856	44,195,947	55,106	986	54,310,651
Kent	12,370	1,967	24,328,973	12,644	1,755	22,196,244
Hants	667	1,740	1,160,722	680	1,473	1,001,550
Surrey	113	2,069	233,798	116	1,608	186,619
Sussex	2,140	1,816	3,887,261	2,130	1,492	3,178,151
Heresford	4,678	1,689	7,900,956	4,683	1,376	6,442,944
Worcester	2,177	1,667	3,628,551	2,152	1,339	2,881,963
Other Counties	54	2,041	110,230	54	1,615	87,192
England	22,199	1,858	41,250,491	22,459	1,602	35,974,663
Europe	73,846	1,157	85,446,438	77,565	1,164	90,285,314
Washington	14,001	1,718	24,059,461	15,300	1,790	27,386,974
Oregon	14,544	1,117	16,252,642	14,900	1,260	18,774,043
California	9,449	1,704	16,104,493	9,501	1,530	14,535,038
Idaho	996	1,862	1,854,289	1,500	1,695	2,543,006
New York	210	971	203,925			110,230*)
USA	39,200	1,492	58,474,810	41,201	1,538	63,349,291
Quebec	22	1,092	24,030			
Ontario	86	802	69,004			
Brit. Columbia	1,552	1,249	1,938,064			
Canada	1,660	1,224	2,031,098	1,596	1,340	2,138,021
Tasmania				1,273	1,961	2,496,709
Victoria				355	1,104	391,978
Australia	1,589	1,568	2,491,198	1,628	1,774	2,888,687
New Zealand	605	1,533	927,586	615	2,034	1,251,000
Japan	1,149	303	348,327	1,263	787	994,275
Manchuria	470	657	308,644	470	704	330,690*)
Argentina	445	124	55,115	87	988	85,980
South Africa	316	557	176,037	469	567	265,985
Total	119,280	1,260	150,259,253	124,894	1,294	161,589,243

*) Estimate

In **Tettngang** cutting was finished during the last decade of April. Ample precipitations during the winter of 1950/51 have sensibly increased subsoil moisture reserves in this district. Weather was anormally cool until the month of May and a good development commenced only in June 1951. Appearances of **Red Spider** were limited but care had to be taken in the control of this pest, while **Aphids** generally were no menace. Growth in June was very good and laterals developed luxuriously. The plant presented a very good aspect in July and was generally overhanging the trellises. **Bloom** developed into the formation of cones during the first decade of August 1951. After excessive rainfalls during July sunshine and warm temperatures favoured the development in August. **Picking** began sporadically on the 20th of August at which time some gardens were prematurely harvested. General start of picking was on August 25th.

In 1951 too, as in almost every year, the Tettngang hops showed a wider range in size of cones than hops of the other districts. The colour too was not quite uniform but lupulin was amply present and the aroma was fine.

Wurttemberg. Night frosts and rainy weather retarded the uncovering and the cutting of the hops. Soil moisture was well increased over former years. Cold weather until the end of May did not favour growth whereas higher temperatures and sufficient rain in June stimulated development. Identical conditions prevailed in July 1951, during which time the plants developed numerous laterals and were overhanging the trellises.

The North Western district suffered from **Hail** on July 11th and 13th and these damages could not be set off anymore. **Bloom** appeared about the 20th of July and further development was satisfactory until **Picking** time which was about a week later than normal.

Wurttemberg hops crop 1951 were almost uniformly of very good quality and satisfied requirements.

Hersbruck. In this district early varieties appeared healthy when uncovered and cut while later varieties sometimes showed **Root Rot**. New gardens laid out in 1950 had sometimes suffered from **Grubworms** and **Wireworms**. Warmer weather beginning by the middle of May stimulated growth and there were sufficient rains in June 1951. By the end of this month the plants were partially overhanging the trellises and showed numerous laterals.

Warmer and dryer weather in July 1951 resulted in vigorous growth. Early varieties showed the first signs of **Burrs** by the middle of this month while **Bloom** of late varieties began at the end of July. At the beginning of August early hops were forming the cones and late hops were in full bloom. The yards generally showed a very good aspect. At the end of August earlier hops were **Ripening** whereas the development of cones of late varieties was somewhat retarded by dry weather. **Picking** of early varieties began about the 27th of August and late hops were picked by the end of August/beginning of September.

The hops were rich in lupulin and more uniform in colour than in other districts of production.

Analyses in hand show the following results for hops crop 1951:

**Bitter values of
crop 1951**

Origin	Total resin content anhydric	Soft resins	%	Humu- lon	%	Lupulon+ Fractions of soft resins	%	Hard resins	%	Bitter value (Wöllmer)
Au	18,3	15,7	86,0	7,0	38,5	8,7	47,5	2,6	14,0	8,0
Mainburg	19,5	16,9	86,8	7,5	38,4	9,4	48,4	2,6	13,3	8,4
Pfeffenhausen	19,6	16,7	85,0	7,7	39,2	9,0	45,8	2,9	15,0	8,7
Siegenburg	19,4	16,8	86,7	7,7	39,7	9,2	47,2	2,6	13,2	8,8
Wolnzach	19,4	16,2	83,3	7,6	39,3	8,5	44,0	3,3	16,7	8,7
Hallertau	20,2	16,7	82,4	7,3	36,0	9,4	46,4	3,6	17,7	8,3
Spalt	19,5	16,3	83,4	7,3	37,1	9,1	46,4	3,2	16,6	8,2
Tettngang	19,9	16,8	84,4	7,8	39,3	8,9	45,2	3,1	15,6	8,8
Wurttemberg	20,7	17,4	84,3	8,4	40,8	9,0	43,4	3,3	15,7	9,4
Gebirg	18,8	15,7	83,3	6,9	36,7	8,8	46,7	3,1	16,7	7,9
Alsace	20,0	13,5	67,6	5,2	26,1	8,3	41,6	6,5	32,3	6,2
Engl. Fuggles	17,0	13,7	80,1	0,8	4,8	12,9	75,3	3,3	19,9	2,3

**Quotations
crop 1950**

The small available supplies of Hallertau, Tettang and Spalt hops crop 1950 were quoted on the average at DM 900.— in May 1951. A transient increase of quotations during June was followed by a decrease in July to DM 820/850.—. Under the influence of the ripening new crop quotations fell to DM 500.— in August and some final lots were traded at about DM 400.— by the beginning of September.

**Estimates of
crop 1951**

The prospective crop 1951 was estimated by the official commission at about 25,900,000 lbs. and even this quantity was surpassed by the final result of the harvest.

An official meeting of the *Bundesministerium für Ernährung, Landwirtschaft und Forsten* was held on the 11th of September 1951 with representatives of various authorities as well as the brewing industry and the hop trade. On this occasion prospective demand by German breweries was indicated at about 14,500,000/15,500,000 lbs. There is no doubt that this quantity has been taken up by the breweries.

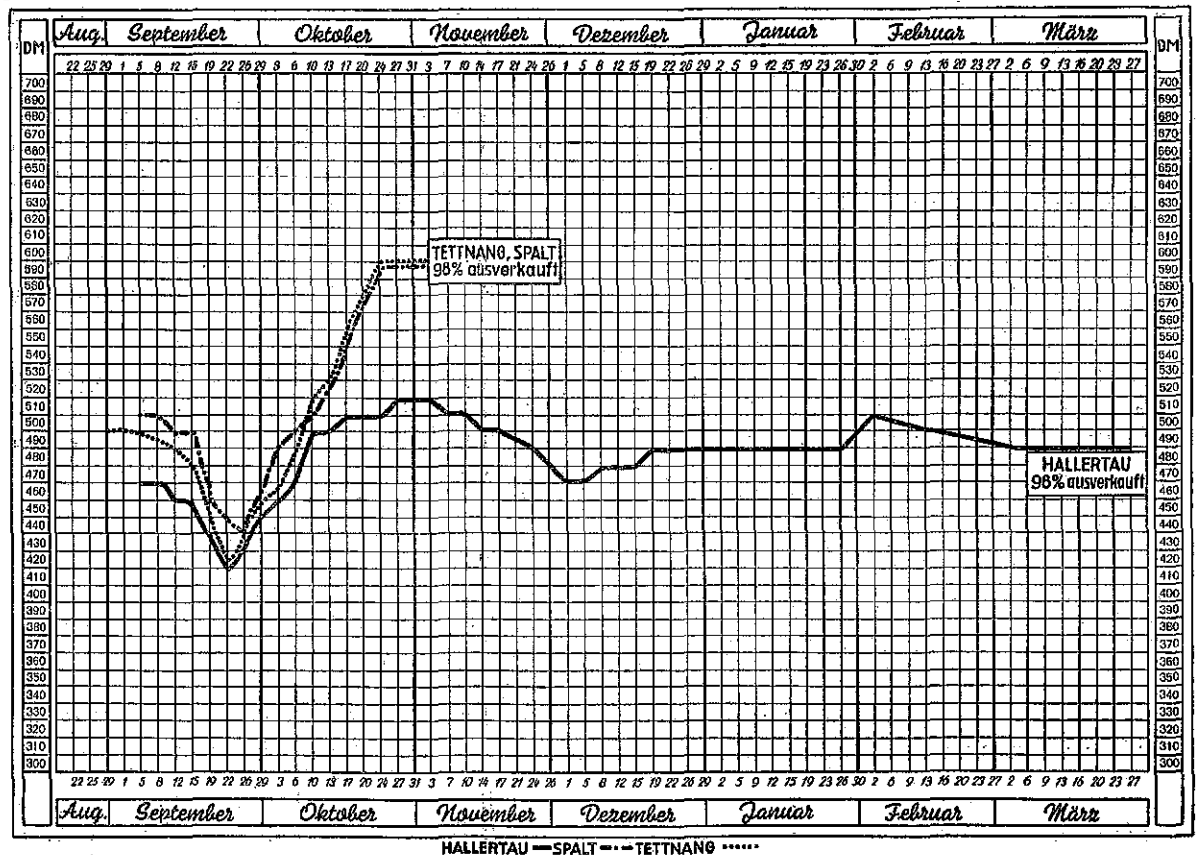
During this meeting the *Ministerium für Ernährung, Landwirtschaft und Forsten* desisted from fixing an official minimum price for the export of hops.

**Purchases
crop 1951**

Trading set in very slowly in the beginning of September 1951 while picking was still in progress. Prices asked by farmers seemed too high considering the quantities harvested and a reluctant demand by German breweries as well as the still unsettled question of a minimum export price were further retarding factors.

Prices decreased under slow trade until the second half of September. During this period farmers still tried to obtain a minimum price for exports. These endeavours, however, became unnecessary by subsequent events. Hops from Spalt and Tettang were principally looked after and these districts were mostly sold out by the middle of October. Increased demand induced farmers to hold back sales already by the end of September. Quotations increased and trade decreased constantly since the middle of October. Although prices maintained their level for some time they could not resist the downward trend in November.

**Development
of quotations
crop 1951**



Tettang: Some breweries, buying directly from farmers paid up to DM 650.— first cost at the beginning of the crop. Farmers are said to have given special conditions of payment for these deals. General purchases began on a basis of DM 500.— and prices sank until DM 430/450.— by the middle of September. At the end of this month prices had increased to a range of DM 450/500.— showing the differences of qualities in Tettang. The market was practically sold out by the middle of October.

Final lots of choicest quality were then sold at prices until DM 600.— and even offgrade hops were sold at corresponding levels.

Spalt. In the beginning prices up to DM 560.— had been asked and were paid for some small lots. General tendency on the market in the beginning of September was about DM 500/520.—. Prices then fell until DM 440/460.— but increased quickly so that by the middle of October the bulk of the crop was sold at quotations until DM 550.— and final lots at DM 600.—.

Hersbrucker Gebirge. Purchasing developed in a markedly slow way in this district as farmers at first were asking too much in comparison to other districts of production. Initially some lots were sold at a range of DM 440/470.— but quotations decreased under slow trading until the 25th of September to DM 380/420.—. In the beginning of October prices rose again. The district was practically sold out by the middle of November and at prices which had risen again up to DM 440/450.—.

Hallertau. First quotations of DM 460/470.— could not be maintained. Prices gave way until DM 410/430.— by the 22nd of September under reluctant trading. This, however, was the lowest point of the market. Demand increased and became quite brisk at some times so that quotations jumped to DM 500/530.— by the end of October. Quieter demand in November induced a slow downglide of quotations, which stood at DM 470/490.— by the end of November. Remaining stocks went into second hands on about the same basis.

Quotations at the beginning of January 1952 were DM 530/540.— for Hallertau hops and DM 560/570.— for Spalt and Tettngang. This range of prices was maintained until April with insignificant fluctuations which showed a somewhat lower tendency for Hallertau hops. These hops were quoted at DM 500/520.— in April. Spalt and Tettngang hops were entirely sold out by April 1952.

Nuremberg
market

The development of season 1951 has shown that even the above average crop 1951 was taken up by demand both for home consumption and abroad. The quieter purchasing operations enabled buyers to maintain standards of quality somewhat more than in former years.

General
tendency
1951

Packing houses and kilns for hops in Germany operated at peak of capacity in consequence of the big crop. It can be noted that all packing orders were terminated in good time even if it were difficult at times to meet short term shipping orders. New warehouses are under construction.

Packing
houses

The exclusion of both groups of members belonging to breweries and to the hop trade by the *Deutsche Hopfenverkehrs-Gesellschaft (D. H. V. G.)* has been under discussion for quite some time.

D. H. V. G.

As all groups expressed the desire for an amicable settlement, planters as well as breweries and hop traders have submitted to arbitration. A commission under the chairmanship of a representative of the Bavarian *Ministerium für Ernährung, Landwirtschaft und Forsten* and a representative of the Chamber of Commerce, Nürnberg, and the *Revisions- und Treuhand A. G., Nürnberg*, has been constituted.

The findings of this commission will be made known during the coming months.

Exports from June until September 1951 amounted to 270,063 lbs. Total exports for crop 1950 amount therefore to 9.761.087 lbs.

German hops
Exports 1950

Imports totalling 111,552 lbs. during the months June to September 1951 increased the total imports crop 1950 to 1,197,318 lbs.

German hops
Imports Crop
1950

Exports of hops from Germany are still subject to license. According to a decree of the *Bayerische Staatsministerium für Ernährung, Landwirtschaft und Forsten* of September 11th 1951 applications must be submitted there for examination. Approval of licenses is done by the *Zentrale Genehmigungsstelle Ernährungswirtschaft (Außenhandelsstelle) Frankfurt a. Main.* By this system a fiscalisation of hops exports by authorities is still exercised.

German hops
Exports Crop
1951

Lack of licenses for import and of exchange in several countries of destination for German hops corresponded on the average to the situation during the preceding years. In addition there is a tendency in certain countries to subordinate imports of hops to the sale of home grown hops. Introduction of German hops on the world market has been broadened as a consequence of the bigger crop 1951 against former years.

German hop exports crop 1951 may be computed according to details in hand as follows:

Exports of German Hops Crop 1951					
October 1951 — May 1952					
	lbs.	lbs.		lbs.	lbs.
Belgium	1,081,356		b. f.		10,521,233
Denmark	712,747		Egypt	22,046	
Finland	144,181		Algiers	11,023	
France	834,221		Kongo	112,655	
Greece	98,546		French Kameroun	11,244	
Great Britain	98,985		French Morocco	50,706	
Italy	419,976		French Western Africa	33,069	
Luxembourg	123,678		Kenya	15,212	
Netherlands	1,334,224		Port. Western Africa	2,425	
Norway	142,858		Sansibar and Pemba	4,189	
Austria	496,476		South Africa	14,550	
Portugal	9,480		South West Africa	6,613	
Roumania	44,092		Tanganyika	7,716	
Saar	74,957		Tunis	11,023	
Sweden	348,768		AFRICA		302,471
Switzerland	353,397		Hong Kong	13,669	
Spain	237,215		India	2,646	
Trieste	9,921		Indochina	101,632	
Hungary	308,644		Indonesia	25,353	
Other Countries	51,808		Iran	6,614	
EUROPE		6,925,530	Japan	248,899	
Argentina	1,010,809		Libanon	6,614	
Bolivia	3,307		Lybia	2,204	
Brit. West India	22,046		Pakistan	2,204	
Brazil	276,677		Philippine Isl.	59,083	
Chile	3,748		Thailand	16,094	
Columbia	3,307		ASIA		485,012
Ecuador	7,936		Australia	441	
Guatemala	441		AUSTRALIA		441
Peru	24,692		Total		11,309,157
U.S.A.	2,122,589				
Venezuela	120,151				
AMERICA		3,595,703			
c. f.		10,521,233			

It is to be expected that exports until September 1952 will increase by about 250,000 lbs so that total exports will exceed 11,500,000 lbs. The increase in exports to the Netherlands may be based on transit operations.

Custom duties for hops

The conference of Torquai was terminated in April 1951. Western Germany took part and has been admitted to the Geneva Agreement (GATT = General Agreement on Tariffs and Trade). The customs law of August 16th, 1951, shows an ad valorem rate of 15% for hops effective October 1st, 1951. In addition, a turnover tax of 4% has to be paid.

Hop imports Crop 1951

Imports of hops crop 1951 decreased considerably as a result of the German crop 1951. The following quantities were imported from October 1951 until May 1952:

Belgium	129,851 lbs.
France	72,090 "
Great Britain	20,503 "
Czechoslovakia	31,526 "
U.S.A.	8,818 "
Total	<u>262,788 lbs.</u>

The total hop acreage in Germany has been limited at 20,756 acres. This total acreage has not yet been attained although considerable capital has been invested in new gardens.

Allocation
of acreage

Based on an official survey of acreages during the month of June, 1951, acreages have been distributed to the various *Länder* by the *Bundesministerium für Ernährung, Landwirtschaft und Forsten* by a decree dated October 27th, 1951, as follows:

Land	Acreage		
	1951	1952	
	Acreage	additional	total
Baden	44 acres	5 acres	49 acres
Bavaria	16,702 "	966 "	17,668 "
Rheinland-Pfalz	69 "	30 "	99 "
Wurttemberg-Baden	388 "	353 "	741 "
Wurttemberg-Hohenz.	1,646 "	553 "	2,199 "
Total	18,849 acres	1,907 acres	20,756 acres

Official publications of acreages according to districts of production show the following somewhat divergent details:

District	1939	1951		
		Existing acreage	Additional acreage	total
Hallertau	11,317 acres	11,394 acres	1,169 acres	12,563 acres
Spalt	2,276 "	— "	— "	2,071 "
Hersbruck	2,118 "	1,166 "	390 "	1,556 "
Jura	200 "	135 "	100 "	235 "
Other Districts	— "	20 "	15 "	35 "
Bavaria	15,911 acres	— acres	— acres	16,460 acres
Wurttemberg-RHW.	1,223 "	448 "	109 "	557 "
Tettwang	1,636 "	1,201 "	314 "	1,515 "
Baden	440 "	— "	— "	86 "
Pfalz	150 "	46 "	23 "	69 "
Total	19,360 acres	—	—	18,687 acres

The planned acreage in Bavaria amounts to 17,668 acres. This total will not be reached in 1952. The following increases have been allotted to the districts of production in Bavaria:

District	1951 Acreage	1952	
		allotted	total
Hallertau	12,563 acres	267 acres	12,830 acres
Spalt	2,070 "	104 "	2,174 "
Hersbruck	1,557 "	79 "	1,636 "
Jura	235 "	39 "	274 "
Other Districts	34 "	— "	34 "
Total	16,459 acres	489 acres	16,948 acres

It remains to be seen how the effective new acreages in the spring of 1952 will compare with acreages officially allotted according to the above summary.

The district of **Aischgrund** has been admitted again to the production of hops according to a resolution of the Bavarian *Landtag* dated September 7th, 1951. The district of Aischgrund produced hops until 1938 when the existing acreage was plowed under. The future extent of this revived district of production is just now under consideration.

New District
of Production

*Deutsche
Demokratische
Republik
(D.D.R.)*

A considerable part of hops requirements has been covered by purchases in England, France, Belgium and Czechoslovakia. Shipments from Western Germany were only sporadically effected. A commercial agreement between the *D.D.R.* and Western Germany, dated May 5th, 1952, has a total scope of 61 millions. It is to be regretted that there is no position for hops. Up to now about 850 cwts. of hops have been contracted and delivered. Negotiations are proceeding for an additional quantity of 800 cwts.

Incomplete news received seem to indicate that experimental gardens near Jena gave a satisfactory result in 1950. About 10 ha of new hop gardens seem to have been laid out in 1951 with cuttings from Czechoslovakia.

Czechoslovakia

Subsoil moisture was low in consequence of scant precipitations during the winter but improved by ample rainfalls during May 1951. Development of the hops was good from July until picking time. Certain losses originated from Downy Mildew. Picking began in Saaz (Zatec) about the 25th of August 1951 and was finished within a fortnight. The harvest was about 10 days later in Auscha (Ustek) and Raudnitz (Roudnice).

Although growing conditions were favourable the general aspect of the gardens was not uniform. A somewhat bigger crop, however, could be harvested on the acreage which may be estimated as somewhat increased against former years. Purchasing began on September 20th after uniform type samples had been determined. Payment to farmers was from Kc. 4000.— to Kc. 4750.— per 50 kilos (§ 80/95.—).

Sales to the United States had been complicated by the annulment of the preferential duties for Czechoslovakian hops. Even so all stocks for export could be sold rather rapidly and at the highest quotations on the world markets. In consequence of brisk demand for these hops Czechoslovakia imported some lots of cheaper hops for home consumption in the same way as last year.

Yugoslavia

Constant rains and cool weather during April and May retarded growth especially in valley locations. Spring work was hampered by weather conditions.

The consequences of the drought in 1950 were evident in the development during 1951 of new gardens laid out in 1950. During July 1951 growth improved under more favourable conditions and Bloom was satisfactory. Old gardens showed a general good development with numerous laterals while younger gardens were not so good. The formation of the cones was stimulated by welcome moisture.

Shortly before picking 1951 the hops suffered in part from Storms. On the average more than half of the gardens showed a good aspect and really defective gardens were not too plentiful. Picking began sporadically about the middle of August and was in full swing by the end of this month. The result of the crop was good in Slovenia whereas the harvest in the Backa did not come up to that of the preceding year.

France

In the Alsace a rather retarded growth improved sensibly in June 1951 under warm weather and ample precipitations. Insect pests were of no great consequence but control of Downy Mildew had to set in during July 1951. The plants came into the burr stage by the middle of July and were in full Bloom by the end of that month. The general aspect of the gardens was quite good although not entirely uniform. Picking began during the first days of September 1951 and an ample harvest was brought in.

While the Alsatian crop could be disposed of until the beginning of 1952 there were certain sales difficulties for hops from Flanders and the Côte d'Azur the quality of which was somewhat lower. These hops entered rather slowly into second hands. There still remain small stocks unsold.

In France too a tendency is notable to retard licenses for import hops in order to favour the sale of home grown hops. The *Deutsche Demokratische Republik* was a considerable buyer of Alsatian hops. It is to be hoped that in future import licenses may be granted more speedily.

England

Weather conditions during 1951 were not too favourable for hops. The development of the plant was retarded by rain and cold weather in the beginning while later in the season drought was sometimes keenly felt. Under these conditions development was not uniform. Formation of the cones and the ripening of hops as well as the harvest suffered partially from rains. The total crop was about 12,8% smaller than in 1950. Bitter value of English hops crop 1951 showed lower points than in the preceding year.

Contracts for English hops were cut by 10% in consequence of the smaller crop. The price for average quality 1951 was fixed at £ 26.2.6, an increase of £ 5.2.6 per cwt. as against crop 1950. This shows that the hop market in England develops quite independently from world market tendencies.

The following contracts have been submitted for crop 1952:

Home consumption 258,170 cwts. (against 248,912 cwts. in 1951)
Exports 23,670 cwts. (against 43,768 cwts. in 1951)

Based on smaller applications, especially for exports, the basic quota for production has been decreased as compared with the preceding year.

Exports of English Hops Crop 1951

September 1951 — May 1952

Channel Islands	409 cwts.	b. f.	27,639 cwts.
Gold Coast	121 "	Sudan	20 "
Kenya	549 "	Jamaica	19 "
Aden	38 "	Falkland-Islands	1 "
Nyasaland	3 "	Irish Republic	32,012 "
Malta and Gozo	906 "	Finland	1,440 "
Mauritius	3 "	Sweden	1,971 "
Cyprus	4 "	Norway	270 "
Sierra Leone	3 "	Denmark	1,013 "
Nigeria	48 "	Germany (East and West)	8,841 "
Union of South Africa	968 "	Netherlands	978 "
Northern Rhodesia	231 "	Belgium	1,662 "
Southern Rhodesia	714 "	Switzerland	144 "
Tanganyika	53 "	Austria	796 "
India	258 "	Trieste	79 "
Pakistan	188 "	Czechoslovakia	1,015 "
Singapore	1,021 "	French Possessions in India	10 "
Ceylon	73 "	Canary Islands	22 "
Federation of Malaya	3 "	Eritrea	78 "
Hong Kong	34 "	Libya	59 "
Australia	18,827 "	Iraq	123 "
New Zealand	866 "	Argentina	116 "
Fiji etc.	29 "	Indonesia	54 "
Canada	2,225 "	Thailand	25 "
Trinidad and Tobago	45 "	U.S.A.	89 "
Egypt	20 "	Total	78,476 cwts.
c. f.	27,639 cwts.		

1 cwt. = 112 lbs.

The favourable climatic conditions during 1951 resulted in a bigger crop than in 1950. Demand for good qualities, most especially from the district of Alost, was quite brisk since the beginning of the season and these qualities were sold without difficulty.

Belgium

Off-grade qualities encountered sales resistance under a decreasing market. There were considerable stocks unsold in farmers' hands during February 1952, the quality of which was determined by an official commission. Sale of these unsold stocks proceeded slowly but inventories of same were reduced to an estimated 165,000 lbs. in May 1952. Approval of import licenses for hops has sometimes been retarded in consideration of the sale's problems of home grown hops.

Imports of hops into Belgium from September 1st, 1951, to March 31st, 1952, were as follows:

	lbs.		lbs.
Czechoslovakia	449,738	b. f.	1,176,154
U. S. A.	49,604	Yugoslavia	102,514
England	85,979	France	1,102
Germany	590,833	Total	<u>1,279,770</u>
c. f.	<u>1,176,154</u>		

During the same time Exports have been computed as follows:

	lbs.		lbs.
Austria	99,207	b. f.	230,380
Brazil	22,046	Denmark	8,819
Germany (East and West)	100,309	Other Countries	11,023
U. S. A.	8,818	Total	<u>250,222</u>
c. f.	<u>230,380</u>		

Austria

Experimental gardens have been laid out by breweries in different parts of Austria for instance in Styria and the Muehlviertel as well as near Vienna. Cuttings came from Germany and Yugoslavia. Results up to now can not yet be considered satisfactory. It seems that the situation in Austria does not favour an extension of hop growing.

Sweden

Hops produced in experimental gardens show a good quality in growth and aroma. Sales are guaranteed to producers at a minimum basis of skr. 10.— per kilo (DM 400.— per Ztr.). It is intended, however, to pay the average price for imported hops. Acreage is under increase according to possibilities.

Spain

The older district of production is situated near La Coruña and brought about 1000 cwts. in 1951.

A new district of production is developing near León since 1950. About 70,000 plants have been laid out mostly from English cuttings (Goldings) and a small part Alsatian cuttings which were very satisfactory. This new district in 1951 brought a crop of only about 100 cwts. but it is expected that production will develop especially well in the future.

Sales of Spanish hops are guaranteed by the Spanish centre of hop production. Price to farmers is Pes. 17.— per kilo of green hops = about \$—.63 per lb. Packing and kilning of hops is done centrally. There are some other small experimental gardens near individual breweries. In Spain hops are grown exclusively on poles as wire is scarce.

Australia

The centre of production is situated in Tasmania where hops are grown mostly in the valley of the river Derwent. Hops are furthermore produced in Victoria in the valley of the King- and Ovens rivers. Production in Western Australia is not of any considerable importance.

Crop 1952 which has been picked in March is smaller than last year. Imports of hops have been restricted by exchange regulations although there is not enough beer produced in Australia and about 30 to 40 % of hops requirements have to be covered by imports.

It is intended to increase the hops production in Australia. An extension of acreage in Victoria is hampered by lack of labour and materials. Experiments of production are in progress since 1950 in New South Wales. These experiments are going on in several districts partially near the district of Victoria. Results up to now seem to point to good prospects.

U. S. A.

In July 1951 the salable quantity for crop 1951 was fixed by the Hop Control Board at 232,500 bales of 200 lbs. each or 46,500,000 lbs. (against 50,000,000 lbs. in 1950). This corresponds to a cut of 26,3% of the total crop 1951 (against 14,2% in 1950). About 15,250,000 lbs. of the crop remained unpicked. It is generally expected that the cut for crop 1952 will be considerably increased.

Quotations in the U.S.A. stood at abt. \$ —.80/—.83 per lb. for seedless hops at the beginning of the season, while semi-seeded and seeded hops were quoted respectively 5 cents per lb. lower.

The general trend of the market was downward throughout the season. Prices have receded about 30 to 40 cents per lb. first cost and even cheaper offers are said to be in the market. The US brewing industry is generally well supplied with hops and is awaiting lower quotations for additional purchases. As of the 1st March 1952, stocks unsold were estimated at abt. 4,300,000 lbs. on farms and abt. 5,000,000 lbs. in second hands. These stocks are composed of hops crop 1949, 1950 and 1951.

Contracts for crop 1952 are offered to farmers on approximately the following basis:

seedless hops \$ —.60 per lb.
seeded hops \$ —.50 per lb.

This indicates a reduction of about 20% as against the situation for the preceding crop 1951.

Hop imports crop 1951 during the period September 1951 to March 1952 are indicated at 2,952,000 lbs. (September 1950 to March 1951 = 1,693,000 lbs.). Available figures show the following imports from October 1951 to January 1952:

Germany	989,645 lbs.
Yugoslavia	807,325 "
Belgium/Luxembourg	16,534 "
Canada	3,527 "
	<u>1,817,031 lbs.</u>

Exports of crop 1950 total 14,276,000 lbs. For the period October 1951 to January 1952 exports totalling 8,612,160 lbs. are indicated of which the following quantities to Europe:

Belgium/Luxembourg	84,546 lbs.	b. f.	299,385 lbs.
Denmark	191,029 "	Norway	46,407 "
Eire	23,810 "	Netherlands	10,803 "
c. f.	<u>299,385 "</u>	Switzerland	108,025 "
		Total	<u>464,620 "</u>

Hop acreage in Japan has been extended about 10% over 1950. The considerable percentage of new gardens came into bearing for the first time in 1951. The plants developed well under favourable weather conditions and damages by pests and diseases were considerably less important than during the year before. These several factors resulted in a crop 1951 about three times as big as in 1950.

Japan

The most important district of production is situated in Nagano. Farmers are under contract to the Japanese breweries. Uniform prices are fixed before the harvest between the authorities, breweries and producers. Prices for crop 1951 were scaled as follows:

Quality I Yen 350.— per kilo = \$ —.44 per lb.
" II " 309.— " " = " —.39 " "
" III " 268.— " " = " —.34 " "
Off grades " 64.— " " = " —.08 " "

Hops are collected through farmers' cooperatives and cured and packed in brewery owned kilns. It is intended to increase the acreage until 50% of the breweries' yearly hop usage are home grown.

Imports of hops crop 1951 were somewhat smaller than the year before, as follows:

	1951	1950
U. S. A.	672,403 lbs.	820,111 lbs.
Germany	249,120 "	227,074 "
Czechoslovakia	22,046 "	— "
	<u>943,569 lbs.</u>	<u>1,047,185 lbs.</u>

A cold spell in March 1952 followed upon a mild winter 1951/52. Spring work was retarded until April. Subsoil moisture was ample and early uncovered gardens especially showed vigorous growth after the weather turned warmer. Cool weather during May and June 1952 did not stimulate development.

Hallertau. The plant has wintered well. **Grubworms**, however, have appeared especially in the Hallertau and caused damages notably in Wolnzach, Siegenburg, Mainburg and Pfeffenhausen. **Downy Mildew** appears sporadically and sprayings have been effected up to six times. The hops have generally reached the height of the trellises. Warm weather will be especially welcome in the Hallertau so that gardens retarded during earlier cool weather may benefit.

Informations from several sources indicate missing hills up to 10% and more in late uncovered gardens. It seems that these deficiencies have been caused by **Cauterization**. There are scarcely any damages in early uncovered gardens where plant development had been advanced. It is supposed that the cauterizations have been caused by insecticides which had been applied against grubworms during the last two years without ill effect.

Spalt. The hops had wintered well. Uncovering began about the middle of April. There are no damages visible either by grubworms or other pests throughout the whole district. Sprayings against sporadically appearing **Downy Mildew** were effected two or three times. The hops have reached the height of the trellises and are developing satisfactorily.

Tettwang. Spring work was retarded by the slow disappearance of the snow cover and began only by the middle of April. **Cutting** was finished at the beginning of May. Sprayings against **Downy Mildew** and **Aphids** have been applied up to four times. The plant is generally overhanging the trellises and shows good growth.

Hersbruck. Hops have wintered well and are healthy. There are no visible damages by insects. Gardens show good aspects and the plants have generally reached the height of the trellises and are overhanging. Up to four sprayings have been applied against **Downy Mildew** and **Aphids** which appeared rather strongly at times.

New trellis yards are evident in the whole district of Hersbruck. To some extent, however, they have only replaced the old pole gardens.

Wurtemberg. Favourable weather during June has stimulated growth in this district. The plants are vigorous and healthy. Gardens which suffered from **Hail** in May have offset this damage in the meantime. Up to three sprayings have been effected against **Downy Mildew** and **Aphids**.

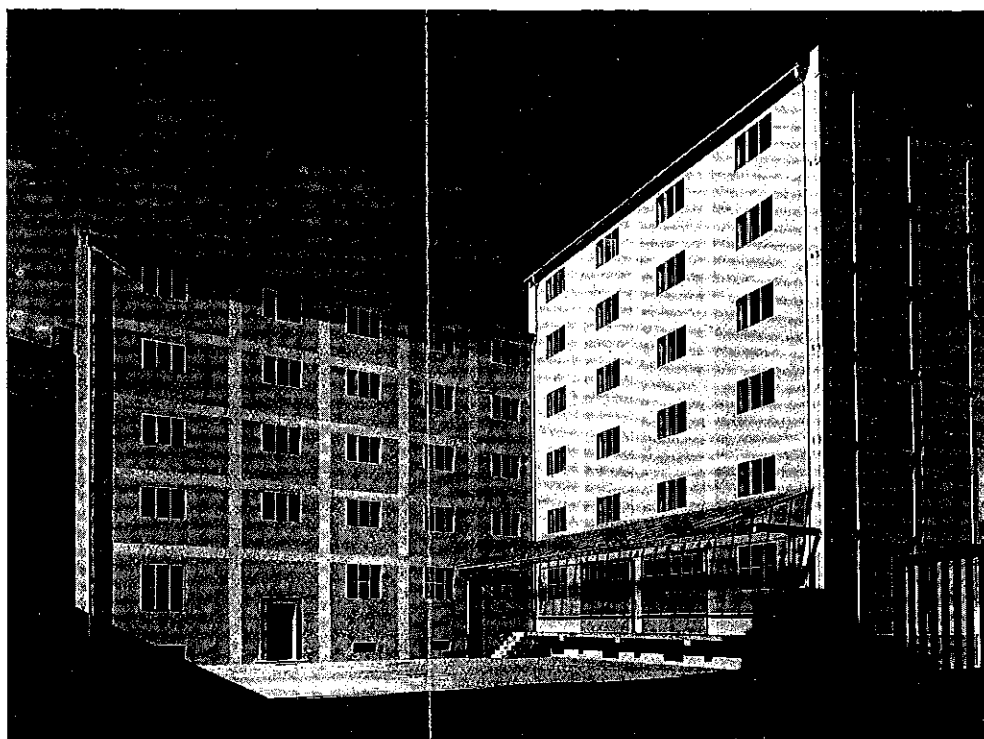
Hot and sultry summer weather has prevailed since the beginning of June and is stimulating growth. Development of the gardens during the coming weeks will be decisive for the outcome of the new crop 1952.

JOH. BARTH & SOHN

Hop Warehouse
JOH. BARTH & SOHN / NÜRNBERG
Glockenhofstraße 24



Bombed out 28th/29th August, 1942



Modern reconstruction 1951